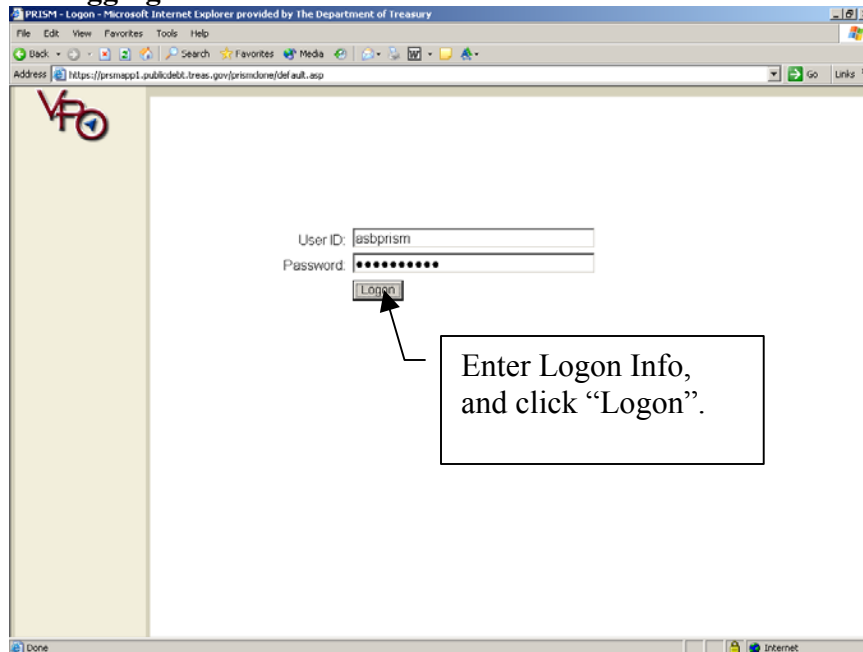


# CREATING A FULL REQUISITION

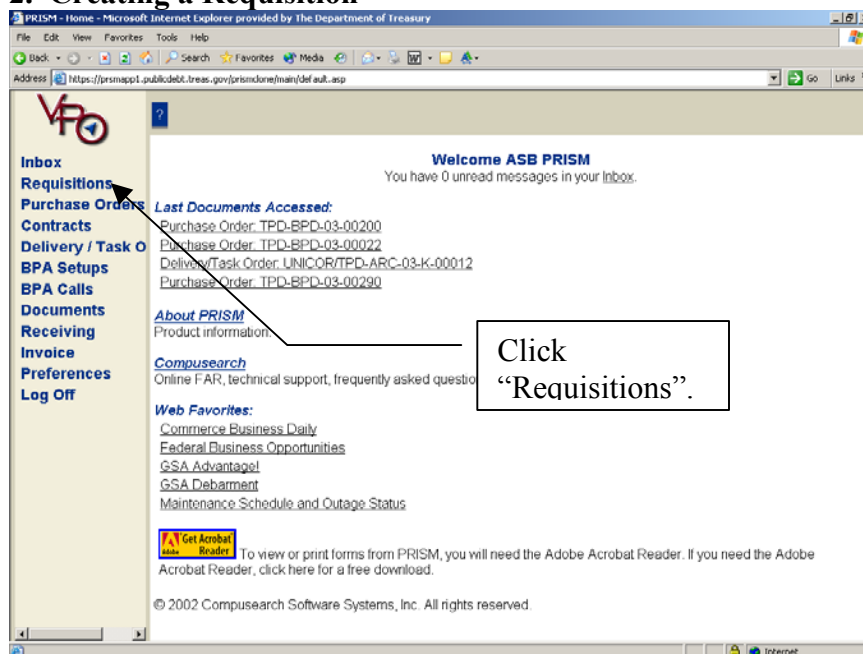
(5/2003)

A full requisition must be used if you wish to create a requisition with a line item that will have multiple accounting cost centers, multiple ship to addresses for the same line item, or if a line item unit of issue must be done by amount and not quantity. Otherwise EZ Req may be utilized.

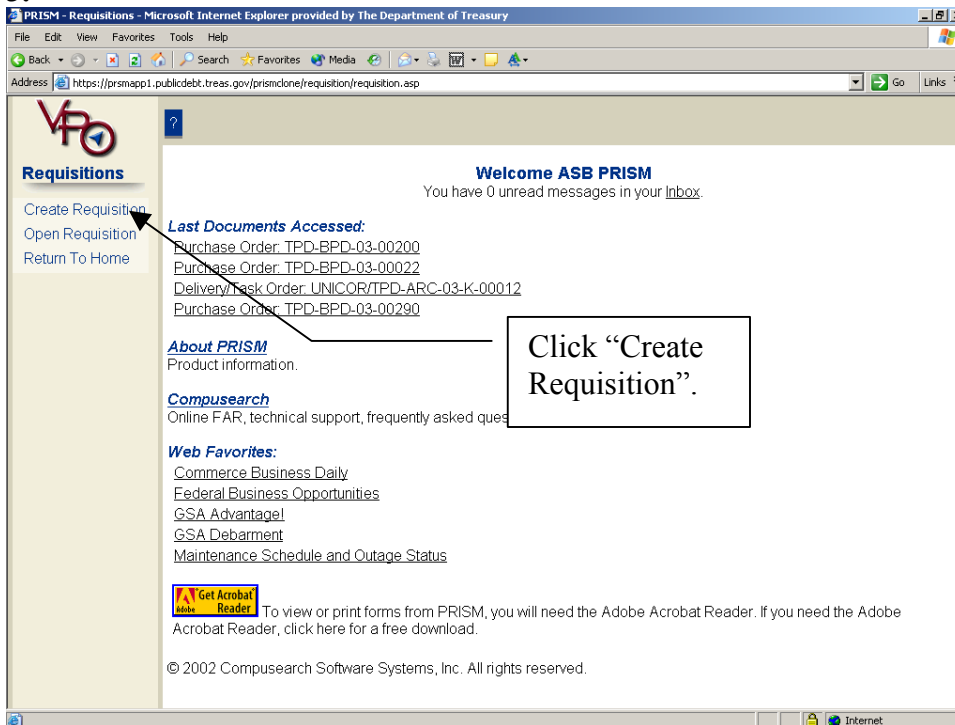
## 1. Logging On



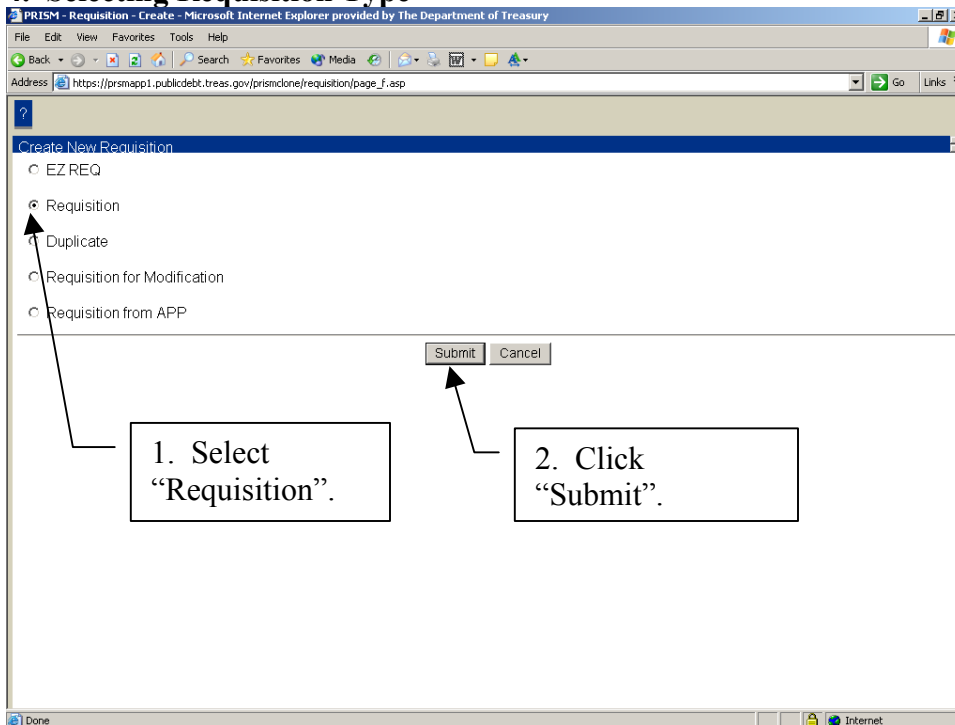
## 2. Creating a Requisition



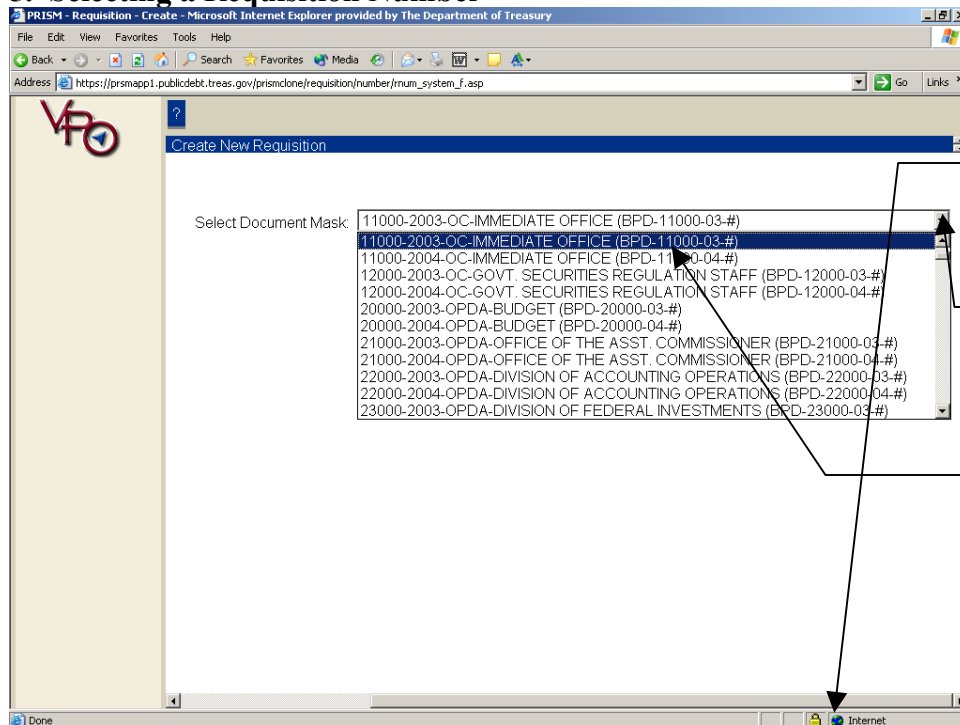
3.



#### 4. Selecting Requisition Type



## 5. Selecting a Requisition Number

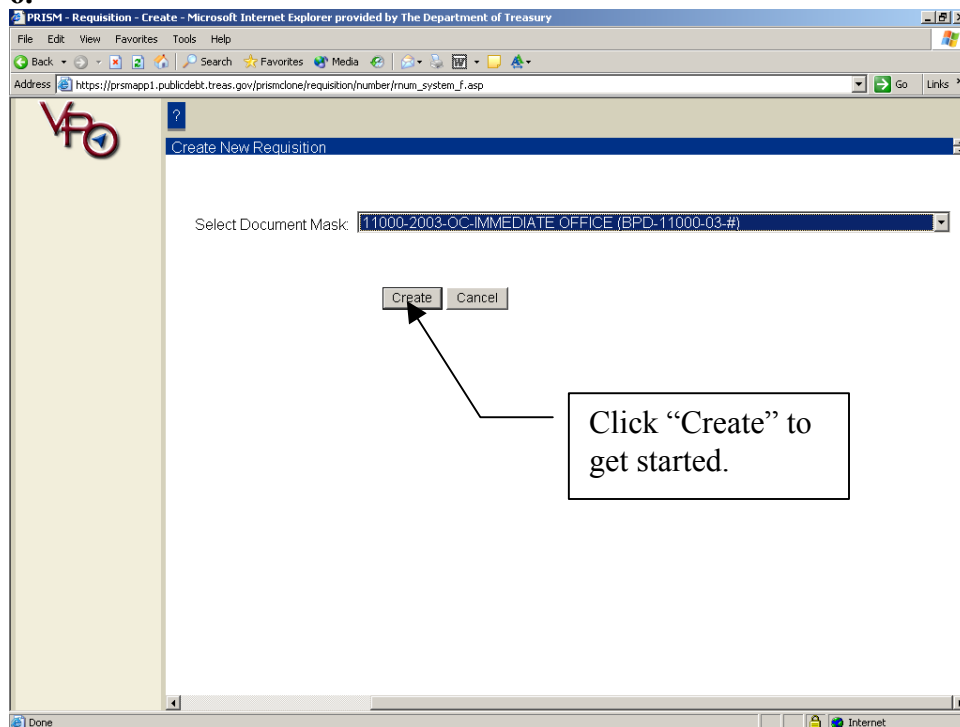


1. Scroll to the right of the screen.

2. Click on the drop down box.

3. Select your Mask.

## 6.



Click "Create" to get started.

## 7. Main - General

**DO NOT FILL IN "BUYER".**

Enter Primary Product/Service code. ALWAYS type "PR".

**Requisition Information**  
 Requisition Number: BPD-11000-03-0006  
 Version: BASE-In Progress  
 Stage: Requisition  
 Number of Items: 0  
 Total Amount: \$0.00  
 Commitment: \$0.00

**General Information**  
 Requisition Date: 05/23/2013  
 Requisitioner: ASBPRISM  
 Buyer:   
 Originating Office:  Edit  
 Primary Product/Service Code: PR  
 Received Date:

## 8. Main – Additional Information

1. Click on "Additional Info"

2. Type in the "Invoice Approver/COR." This is the primary contact for this Requisition and/or the person who will be signing invoices.

3. If you are requisitioning a service that has a set start and ending date, complete the Performance Start and End Date fields, otherwise leave them blank.

**Requisition Information**  
 Requisition Number: BPD-11000-03-0006  
 Version: BASE-In Progress  
 Stage: Requisition  
 Number of Items: 0  
 Total Amount: \$0.00  
 Commitment: \$0.00

**Additional Information**  
 Requested By:   
 Phone:   
 Technical Point of Contact:   
 Issuing Office: BPD Edit  
 Admin Office: BPD Edit  
 Payment Office: ARC/ASD/ASB Edit  
 DO/DPAS Rating:   
 Site: BPD  
 Organization: BPD BUREAU OF PUBLIC DEBT  
 Invoice Approver/COR: Brian Woodward  
 Performance Start Date:   
 Performance End Date:   
 Credit Card Vendor:

**9. Main – Text.** A "Justification" should be added in the “Main:Text” section under "Footer Text" or “Header Text”, or as an Attachment under “Supporting Docs” (see page 15 for adding supporting documents).

1. Click on Text.

2. You can add a justification to the requisition in one of the text boxes, called “Header Text” or “Footer Text”.

Users can use the Attachment/Supporting Document feature for including sole source justification, statements of work, etc.

**10. Main - Defaults**

1. Click on “Defaults”.

2. If you need to alter the Ship To address to elaborate on the delivery location then please refer to Appendix 1 at the end of this manual. Otherwise, leave the default address as it is.

3. Enter the # of Days After Award, a Delivery Date, or the Period of Performance. **ENTER ONLY ONE OF THE THREE.**

11.

PRISM - Defaults - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/requisition/defaults/defaults\_f.asp

Requisition Information  
 Requisition Number: BPD-11000-03-0006  
 Version: BASE-In Progress  
 Stage: Requisition  
 Net View: Off  
 Number of Items: 0  
 Total Amount: \$0.00  
 Commitment: \$0.00

Defaults for New Items

Select Accounting Code: Alias... A/C Combo...

Treasury Symbol  
 Fiscal Year  
 USSGL  
 Cost Code  
 Object Class  
 Reporting Category  
 CAT\_B\_APPR  
 Cohort  
 Project  
 Future 1  
 Future 2

OPERATING EXPENSES  
 DEFAULT  
 DEFAULT  
 FUTURE USE  
 FUTURE USE  
 FUTURE USE

Done

Start

Thomas Northrup... [6] 01:39 - CD PL... ARC - Oracle Sit... PRISM - Defa... V:\Procurement\... Creating a Full R... Creating a Full R... 4:20 PM Friday

1. Scroll down the page.

2. Note that the Treasury Symbol, Fiscal Year, Cost Code, and Object Class are blank. The end user must provide this information.

12.

PRISM - Defaults - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/requisition/defaults/defaults\_f.asp

Requisition Information  
 Requisition Number: BPD-11000-03-0006  
 Version: BASE-In Progress  
 Stage: Requisition  
 Net View: Off  
 Number of Items: 0  
 Total Amount: \$0.00  
 Commitment: \$0.00

Defaults for New Items

Select Accounting Code: Alias... A/C Combo...

Treasury Symbol  
 Fiscal Year  
 USSGL  
 Cost Code  
 Object Class  
 Reporting Category  
 CAT\_B\_APPR  
 Cohort  
 Project  
 Future 1  
 Future 2

OPERATING EXPENSES  
 DEFAULT  
 DEFAULT  
 FUTURE USE  
 FUTURE USE  
 FUTURE USE

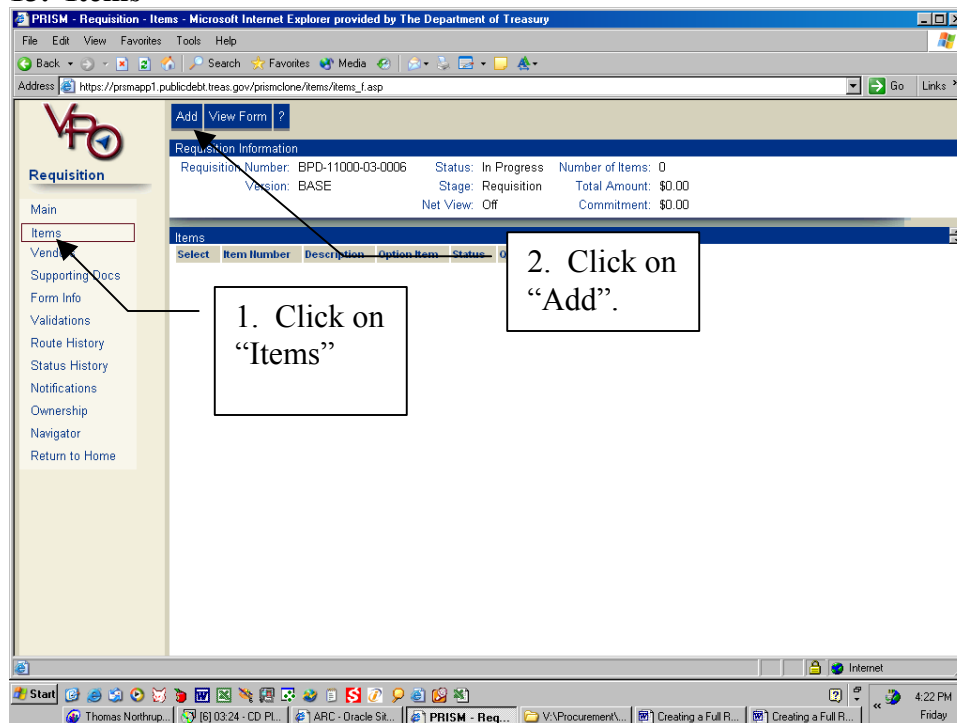
Start

Thomas Northrup... [6] 02:48 - CD PL... ARC - Oracle Sit... PRISM - Defa... V:\Procurement\... Creating a Full R... Creating a Full R... 4:21 PM Friday

1. Fill in the required fields.

2. Use the look-up button if you do not know a value.

### 13. Items



PRISM - Requisition - Items - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/items/items\_i.asp

**Requisition**

Main  
**Items**  
 Vendors  
 Supporting Docs  
 Form Info  
 Validations  
 Route History  
 Status History  
 Notifications  
 Ownership  
 Navigator  
 Return to Home

Requisition Information

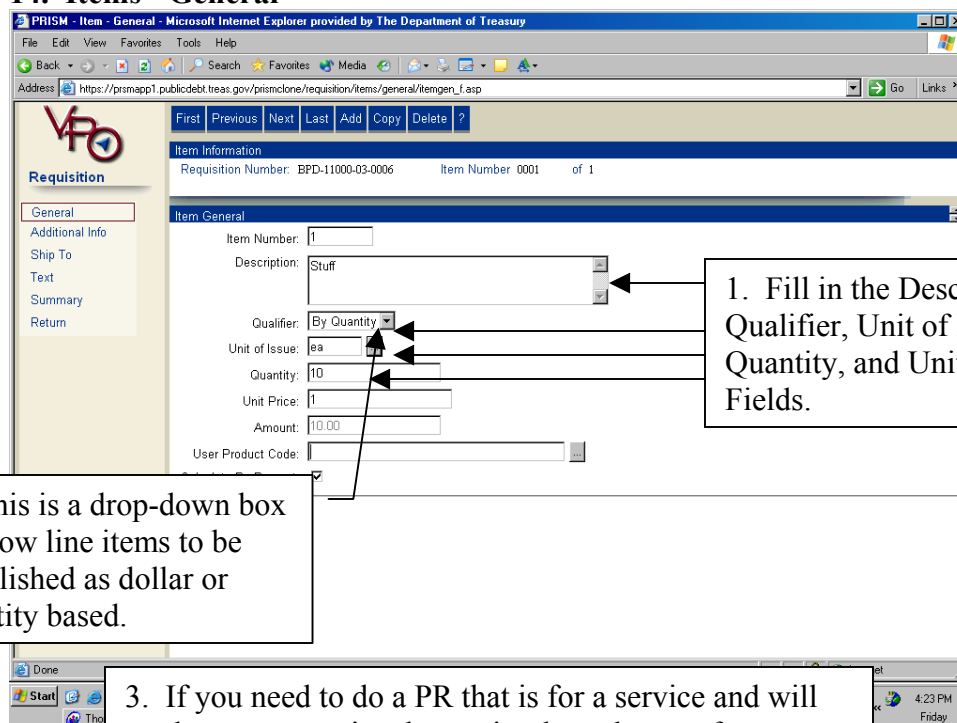
Requisition Number: BPD-11000-03-0006    Status: In Progress    Number of Items: 0  
 Version: BASE    Stage: Requisition    Total Amount: \$0.00  
 Net View: Off    Commitment: \$0.00

Select	Item Number	Description	Option Item	Status

1. Click on "Items"

2. Click on "Add".

### 14. Items - General



PRISM - Item - General - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/requisition/items/general/itemgen\_i.asp

**Requisition**

General  
 Additional Info  
 Ship To  
 Text  
 Summary  
 Return

Item Information

Requisition Number: BPD-11000-03-0006    Item Number 0001    of 1

Item General

Item Number: 1

Description: Stuff

Qualifier: By Quantity

Unit of Issue: ea

Quantity: 10

Unit Price: 1

Amount: 10.00

User Product Code:

1. Fill in the Description, Qualifier, Unit of Issue, Quantity, and Unit Price Fields.

2. This is a drop-down box to allow line items to be established as dollar or quantity based.

3. If you need to do a PR that is for a service and will not have an associated quantity then please refer to Appendix 2 of this manual. In other words, the line item will merely have a lump dollar amount. This is called a "by dollars" PR.

## 15. Items – Ship To

PRISM - Ship To/Accounting - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/shipsto/shipsto\_i.asp

Requisition

General  
Additional Info  
**Ship To**  
Text  
Summary  
Return

Item Information  
Requisition Number: BPD-11000-03-0006 Item Number 0001 of 1

Add

Ship To / Accounting

Select	Ship To	Mark For	Quantity	Amount	Deliver By
--------	---------	----------	----------	--------	------------

1. Click "Ship To".

2. Click "Add" to add the shipping info.

## 16. Items – Ship To, Accounting

PRISM - Item - Ship To - Detail - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/shipsto/detail/item\_shipsto\_detail\_i.asp

Click Submit to save your data.

Requisition Information  
Requisition Number: BPD-11000-03-0006 Description: Stuff Quantity: 10  
Version: BASE Unit Price: \$1.00  
Amount: \$10.00

Delivery Location / Accounting Detail

Ship To

Ship To: PUBLIC DEBT - PKB Edit Mark For Edit

Quantity: 10 Amount: 10.00

Delivery Date: OR Days After Award: 30

Accounting Add

Submit Cancel

1. Notice how the "Ship To" address, quantity, amount, and days after award pulled through from our defaults. Change this information as necessary on individual line items.

2. Click "Add" to add our accounting data.



17.

Click Submit to save your data.

Requisition Information

Requisition Number: BPD-11000-03-0006 Ship To Code: PUBLIC DEBT - PKB Quantity: 10  
Version: BASE Amount: \$10.00

Accounting Information Detail

Calculate Submit Cancel

Accounting Information:

Select Accounting Code: Alias... A/C Combo...

Treasury Symbol: BPD0560SE03XX PUBLIC DEBT 03 APPROPRIATED  
Fiscal Year: 2003 BFY 2003  
USSGL: 610001 OPERATING EXPENSES  
Cost Code: BPD1100000 IMMEDIATE  
Object Class: 2611 GENERAL  
Reporting Category: 00000000  
CAT\_B\_APPR: XXX  
Cohort: XX  
Project: XXXXXXXXXX  
Future 1: XXXXXXXXXX  
Future 2: XXXXXXXXXX  
Percent: 100  
Quantity: 10  
Amount: \$10.00  
Committed Amount: Unobligated:  
Subject to Availability of funds: ☐

Calculate Submit Cancel

1. Note how the Treasury Symbol, Fiscal Year, Cost Code, and Object Class pulled through from our defaults menu. **HOWEVER, ANY PIECE OF THIS DATA CAN BE CHANGED ON AN INDIVIDUAL LINE ITEM AS NECESSARY.**

2. Click "Submit" when the information is complete.

18.

Click Submit to save your data.

Requisition Information

Requisition Number: BPD-11000-03-0006 Description: Stuff Quantity: 10  
Version: BASE Unit Price: \$1.00  
Amount: \$10.00

Delivery Location / Accounting Detail

Ship To

Ship To: PUBLIC DEBT - PKB Edit Mark For: Edit  
Quantity: 10 Amount: \$10.00  
Delivery Date: OR Days After Award: 30

Accounting Add Edit Delete

Select Accounting Code Amount Unawarded

Select	Accounting Code	Amount	Unawarded
<input checked="" type="checkbox"/>	BPD0560SE03XX/2003/610001/BPD1100000/2611/00000000/XX	\$10.00	\$10.00

Submit Cancel

Now choose "Submit" again.

19.

**Requisition**

General  
Additional Info  
**Ship To**  
Text  
Summary  
Return

Item Information  
Requisition Number: BPD-11000-03-0006 Item Number 0001 of 1

Add Edit Delete

Ship To / Accounting

Select	Ship To	Mark For	Quantity	Amount	Deliver By
<input checked="" type="checkbox"/>	PUBLIC DEBT - PKR		10	\$10.00	30 Days After Award

1. If multiple cost centers must be utilized to fund one line item or if it is necessary to add a second shipping location please refer to the manual titled, "Multiple Shipping Addresses".

2. Click "Return".

20.

**Requisition**

Main  
**Items**  
Vendors  
Supporting Docs  
Form Info  
Validations  
Route History  
Status History  
Notifications  
Ownership  
Navigator  
Return to Home

Item Information  
Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$10.00  
Net View: Off Commitment: \$10.00

Add Edit Delete Copy Renumber Change Status View Form ?

Items

Select	Item Number	Description	Option Item	Status	Quantity	Amount	Version
<input checked="" type="checkbox"/>	0001	Stuff		Item Active	10	\$10.00	BASE

To add a new line item, delete a line item, copy a line item, or renumber some or all of the line items use the blue buttons at the top.

21.

Requisition Information

Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$10.00  
 Net View: Off Commitment: \$10.00

Select	Item Number	Description	Option Item	Status	Quantity	Amount	Version
	0001	Stuff		Item Active	10	\$10.00	BASE

1. To edit a line item, you may click on the number itself or on the “Edit” button in blue at the top.

2. Click “Vendors”.

## 22. Suggested Vendors

Requisition Information

Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$10.00  
 Net View: Off Commitment: \$10.00

Select	Code	Name	Phone
--------	------	------	-------

1. Adding a suggested vendor is not required. Add a vendor as necessary, if you would like to recommend a vendor or vendors to the Buyer for use when soliciting quotes.

2. When you are adding a vendor that is in the database of previously used vendors, you may click “Add”. To add a vendor from new, skip to print screen 25 of this manual.

[Main Content](#)

23.

PRISM - Vendor - Selection - Microsoft Internet Explorer provided by The Department of Treasury

Address: [https://prismapp1.publicdebt.treas.gov/prismclone/requisition/select/reqvendor/vendor\\_1.asp](https://prismapp1.publicdebt.treas.gov/prismclone/requisition/select/reqvendor/vendor_1.asp)

Vendor Selection

Search: Code For: [ ] Display Cancel

Max Results: [ ] Results per Page: 10

Code	Contact Name	Contact Phone	DUNS	Address 1	Address 2	Address 3	Address 4	City
000000	DUNS			39505 WOODWARD AVE STE 1000				BLO
000000	Address 1			201 W THIRTEEN MILE ROAD				MAD
000061	Address 2			LIBRARY OF CONGRESS				WAS
000094	Address 3			PO BOX 101343				ATLA
001125	Address 4			100 SIMPLEX DRIVE				WES
001125	City			1 ELMCROFT RD				STAI
001161	State			9387 DIELMAN INDUSTRIAL DR				SAIN
001210624	HOWE FURNITURE COMPANY			899 OLD ROUTE 220 NORTH				DUN
001502244	F L SMITHE MACHINE CO INC			10 FINDERNE AVE				BRIC
001519230	NATL STARCH AND CHEMICAL CO			111 RIVER STREET				HOB
001519248	JOHN WILEY & SONS INC							

Page 1 of 10 (Too many results: Only 100 retrieved. Use Search options to limit results.)

Use the dropdown box to change the search criteria to "Name".

24.

PRISM - Vendor - Selection - Microsoft Internet Explorer provided by The Department of Treasury

Address: [https://prismapp1.publicdebt.treas.gov/prismclone/requisition/select/reqvendor/vendor\\_1.asp](https://prismapp1.publicdebt.treas.gov/prismclone/requisition/select/reqvendor/vendor_1.asp)

Vendor Selection

Search: Name For: verizon Display Cancel

Max Results: 100 Results per Page: 10

Code	Name	Contact Name	Contact Phone	DUNS	Address 1	Address 2	Address 3	Address 4	City
127671436	VERIZON CALIFORNIA INC				ONE VERIZON PLACE				
070091223	VERIZON COMM NEW JERSEY INC			070091223	777 PARKWAY AVENUE				
178041406	VERIZON FEDERAL INC				1710 H ST NW - 8TH FLOOR				
149795791	VERIZON FLORIDA INC				201 N FRANKLIN STREET			ONE TAMPA CITY CENTER	
847073335	VERIZON NETWORK INTEGRATION				52 EAST SWEDES FORD ROAD				
070047274	VERIZON NEW YORK				11 WARDS LAND STE 1 G				
007913171	VERIZON PENNSYLVANIA INC				2580 GENERAL ARMISTEAD AVENUE				
007941081	VERIZON VIRGINIA INC			007941081	3011 HUNGARY SPRING ROAD				
006919484	VERIZON WASHINGTON DC INC				1710 H STREET NW 3RD FLOOR				

Page 1 of 1 (9 results found)

1. Type in the vendor's name.

2. Click "Display".

3. When the vendor names appear, choose the one you desire.

25.

PRISM - Requisition - Vendors - Microsoft Internet Explorer provided by The Department of Treasury

Address: [https://prismapp1.publicdebt.treas.gov/prismclone/requisition/reqvendor/reqvendor\\_f.asp](https://prismapp1.publicdebt.treas.gov/prismclone/requisition/reqvendor/reqvendor_f.asp)

**Requisition Information**

Requisition Number: BPD-1000-03-0006	Status: In Progress	Number of Items: 1
Version: BASE	Stage: Requisition	Total Amount: \$10.00
Net View: Off	Commitment: \$10.00	

**Vendors**

Select	Code	Name	Phone
<input checked="" type="checkbox"/>	006919484	VERIZON WASHINGTON DC INC	

1. The vendor info appears.

2. To add a vendor from new, click "Add Temporary".

26.

**Temporary Vendor**

Name:

Contact Name:

Address:

City:

State:

Zip:

Country:

Phone:

TIN:

DUNS Number:

CAGE Number:

TPIN:

Notes:

Submit Cancel

All of the information is blank. Fill it in as is done in print screen 27.

27.

Click Submit to save your data.

**EZ REQ Information**  
 Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$10.00  
 Commitment: \$10.00

**Temporary Vendor**  
 Name: Tom's Company  
 Contact Name: Tom  
 Address: 123 Main Street  
 City: Parkersburg  
 State: WV  
 Zip: 26101  
 Country:  
 Phone: (304) 555-0000  
 TIN:  
 DUNS Number:  
 CAGE Number:  
 TPIN:  
 Notes: GSA Schedule Number: GSF-123  
 E-mail: tom@tomscompany.com

Submit Cancel

1. Complete whatever fields you know and that you think would be useful to the Buyer. Generally, this is the Company's name, a contact name, address and phone. If you know of a GSA Schedule# or Government-wide Contract# and the contact's e-mail address, it is helpful if you include this in the Notes section at the bottom. Don't be concerned with such fields as TIN, DUNS, GAGE or TPIN.

2. After filling out as much of the information that you can provide, click "Submit".

28.

**Requisition Information**  
 Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$10.00  
 Net View: Off Commitment: \$10.00

**Vendors**

Select	Code	Name	Phone
<input checked="" type="checkbox"/>	006919484	VERIZON WASHINGTON DC INC	
<input type="checkbox"/>	T000001658	Tom's Company	(304)555-0000

Supporting Docs Form 1 Validations Route History Status History Notifications Ownership Navigator Return to Home

1. The vendor is assigned a temporary ID.

2. Click "Supporting Docs" if you need to add an attachment. **THIS IS NOT REQUIRED, USE IT AS NECESSARY.**

## 29. Supporting Documents (Attachments)

The screenshot shows a web browser window with the VFO logo in the top left. The main content area is titled 'Requisition Information' and displays the following details:

Requisition Number: BPD-11000-03-0006	Status: In Progress	Number of Items: 1
Version: BASE	Stage: Requisition	Total Amount: \$10.00
	Net View: Off	Commitment: \$10.00

Below this information is a section titled 'Supporting Documents Selection'. An arrow points from a text box labeled 'Click "Add".' to the 'Add' button in the top left corner of the main content area.

On the left side, there is a navigation menu with the following items:

- Main
- Items
- Vendors
- Supporting Docs
- Form Info
- Validations
- Route History
- Status History
- Notifications
- Ownership
- Navigator
- Return to Home

At the bottom of the main content area, there is a 'Main Content' button.

## 30.

The screenshot shows a web browser window with the VFO logo in the top left. The main content area is titled 'Create New Attachment / Supporting Document'. It features a radio button labeled 'Attachment' which is selected, and a text input field labeled 'Supporting Document'. Below the input field are 'Submit' and 'Cancel' buttons. An arrow points from a text box labeled '1. Leave "Attachment" selected.' to the 'Attachment' radio button. Another arrow points from a text box labeled '2. Click "Submit".' to the 'Submit' button. A 'Main Content' button is also visible at the bottom of the main content area.

31.

Click Submit to save your data.

Details

Subject:

Attachment Number:

Attachment Sequence:

Approver:

Approval Date:

Author:

Exception:

Required? ☐

File Name:

Description (up to 32,000 characters):

Submit Cancel

History:

1. The only required field is "Subject". So fill in a subject name.

2. NEVER CHECK THIS BOX, JUST LIKE WILLY WONKA'S RED ELEVATOR BUTTON.

3. Click the look-up button next to "File Name".

32.

Check In

Select file to upload:

Browse...

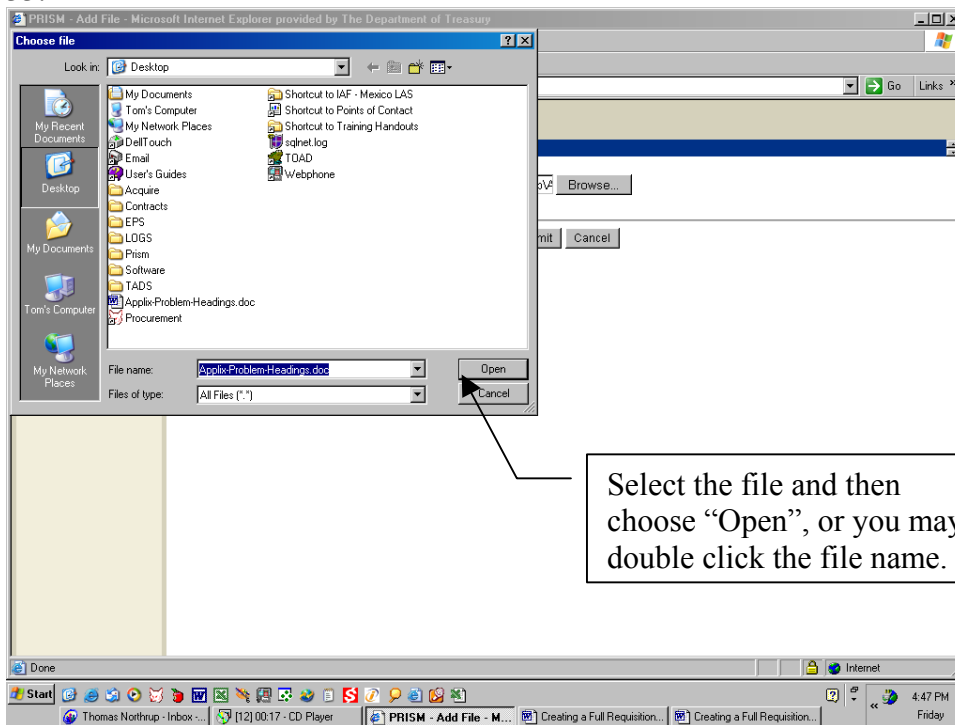
Submit Cancel

Main Content

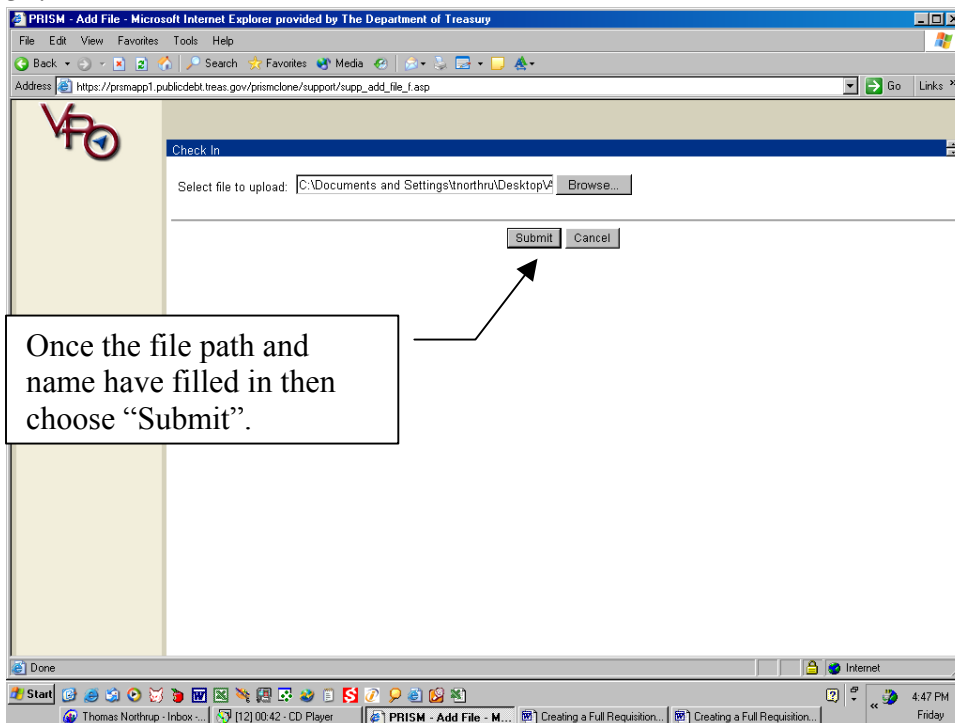
Click "Browse" to find the file on your network drive or your computer's hard or disk drive.



33.



34.



35.

**Details**

Subject: Justification

Attachment Number: [ ]

Attachment Sequence: [ ]

Approver: [ ]

Approval Date: [ ]

Author: [ ]

Exception: [ ]

Required? ☐

File Name: Applix-Problem-Headings.doc [Detach...](#)

Description (up to 32,000 characters): [ ]

[Submit](#) [Cancel](#)

History: [ ]

**Annotations:**

- A yellow box on the left says: "Click Submit to save your data."
- An arrow points from the "Submit" button to a box that says: "Choose 'Submit' once more."

36.

**Requisition**

Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$10.00  
 Net View: Off Commitment: \$10.00

**Supporting Documents Selection**

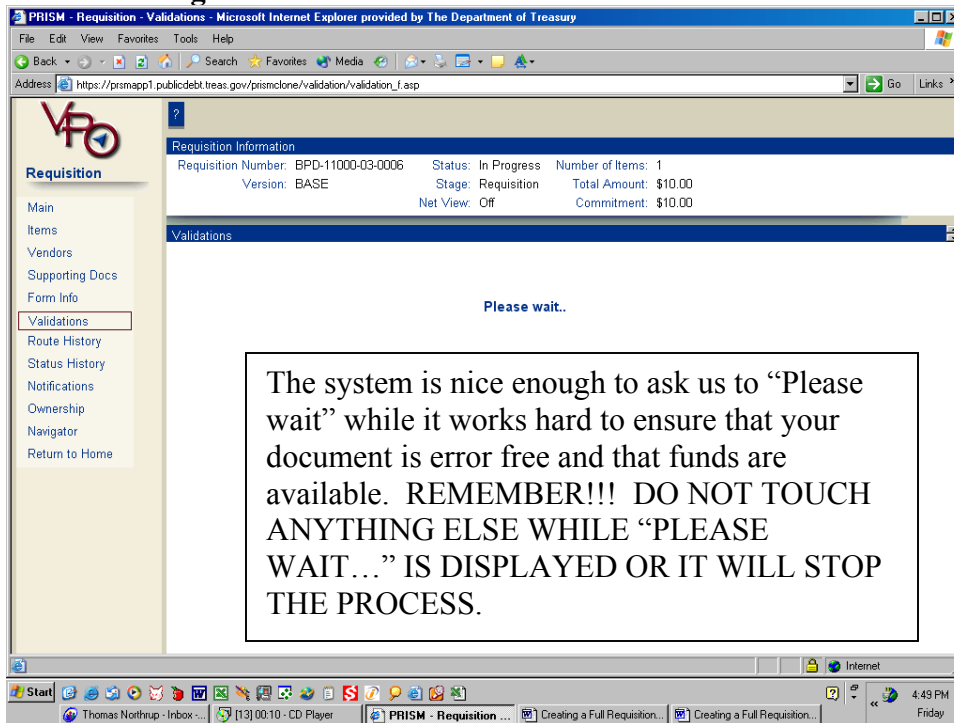
**Attachments**

Select	Subject	Required	Approved	Attachment Number	Locked	File Name / Exception	Version
<input checked="" type="checkbox"/>	Justification	N	N			<a href="#">Applix-Problem-Headings.doc</a>	BASE

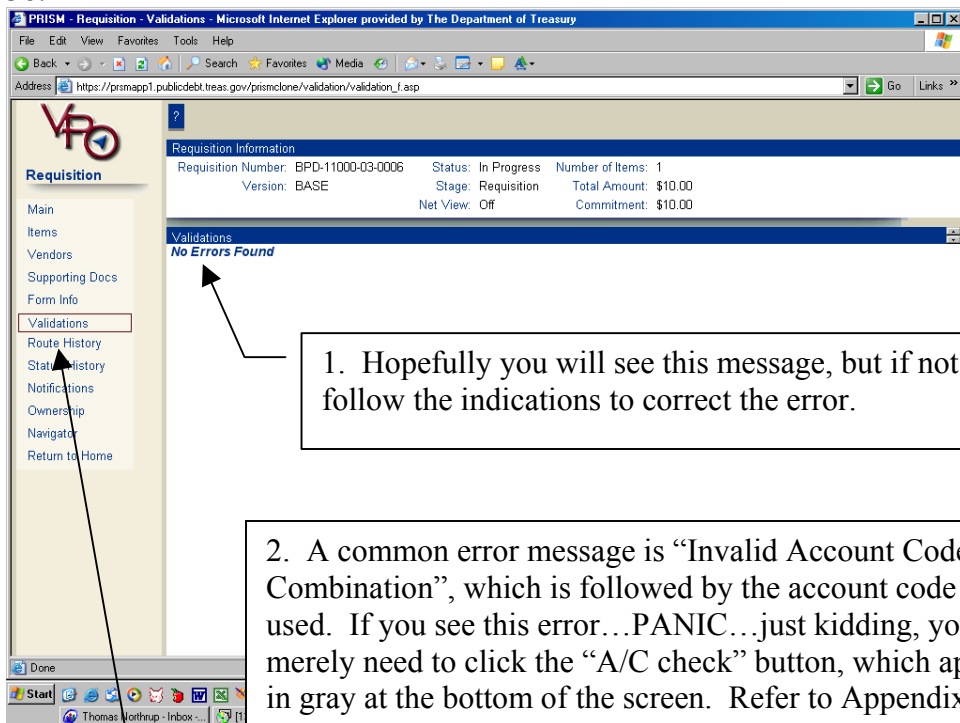
**Annotations:**

- If you wish to view the attachment, click the hyperlink under the "File Name" heading.
- Click "Validations" and then DO NOT TOUCH ANYTHING ELSE.

### 37. Validating



### 38.

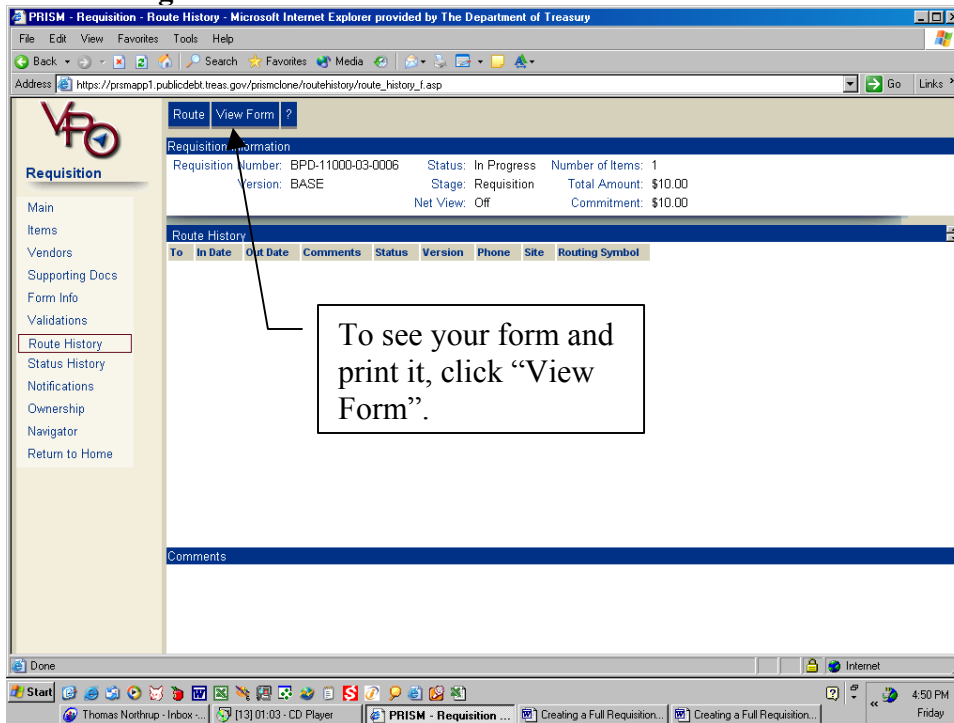


1. Hopefully you will see this message, but if not, just follow the indications to correct the error.

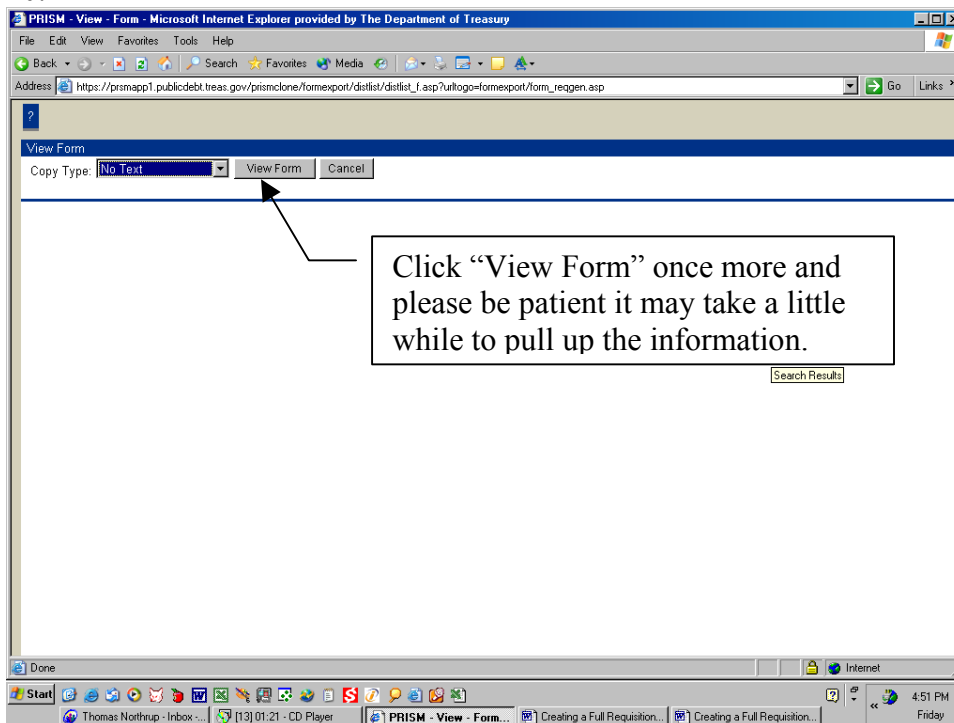
2. A common error message is "Invalid Account Code Combination", which is followed by the account code you used. If you see this error...PANIC...just kidding, you merely need to click the "A/C check" button, which appears in gray at the bottom of the screen. Refer to Appendix 3 if you need help with this particular error.

3. Once your document is error free, click "Route History".

### 39. Viewing a Printable Form



### 40.



41.

https://prsmapp1.publicdebt.treas.gov/prismclone/tomtemp/vfAC16.htm/10908871.pdf - Microsoft Internet Explorer provided by The

Address https://prsmapp1.publicdebt.treas.gov/prismclone/tomtemp/vfAC16.htm/10908871.pdf

Page 1 of 2

READ INSTRUCTIONS ON NEXT PAGE

## REQUISITION

1. NAME, PHONE NUMBER, AND ROUTING SYMBOL OF PERSON TO CONTACT				PROCUREMENT REQUEST NO. BPD-11000-03-0006	
3. ORIGINATING OFFICE DATA				REQUISITION DATE 05/23/2003	
4. ADDITIONAL INFORMATION (Suggested supply sources, security data, etc.) See Schedule				2. TYPE OF REQUEST (Check one) A. <input checked="" type="checkbox"/> NEW REQUEST B. <input type="checkbox"/> CHANGE TO PENDING PR NO. _____ C. <input type="checkbox"/> MODIFICATION TO CONTRACT OR ORDER NO. _____	
5. APPROVALS				6. CONSIGNEE AND DESTINATION	
APPROVING OFFICIALS (A)	ROUTING SYMBOL (B)	DATE (C)	INITIALS (D)		ROUTING SYMBOL (E)
1) AUTHORIZED REQUISITIONER ASB PRISM	BPD				
2)					
3)					
4)					
				7. DATE(S) REQUIRED 30 days after award	
				8. GOVERNMENT FURNISHED PROPERTY <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (If "Yes," see par. 8 of instructions on next page.)	

160% 1 of 2 8.5 x 11 in

Done

Start Thomas Northrup - In... [13] 02:02 - CD Player PRISM - View - Form ... https://prsmapp1... Creating a Full Requis... Creating a Full Requis... 4:51 PM Friday

The form may launch in your current browser, or it may launch in a separate browser, depending on your Internet settings. If it launched in your current browser then use the browser's "Back" button to return to PRISM. Otherwise, just click the "X" at the top of the browser to close the new window when you are done.

42.

PRISM - View - Form - Microsoft Internet Explorer provided by The Department of Treasury

Address https://prsmapp1.publicdebt.treas.gov/prismclone/tomtemp/distlist/distlist\_f.asp?urltogo=tomtemp/tom\_reagen.asp

View Form

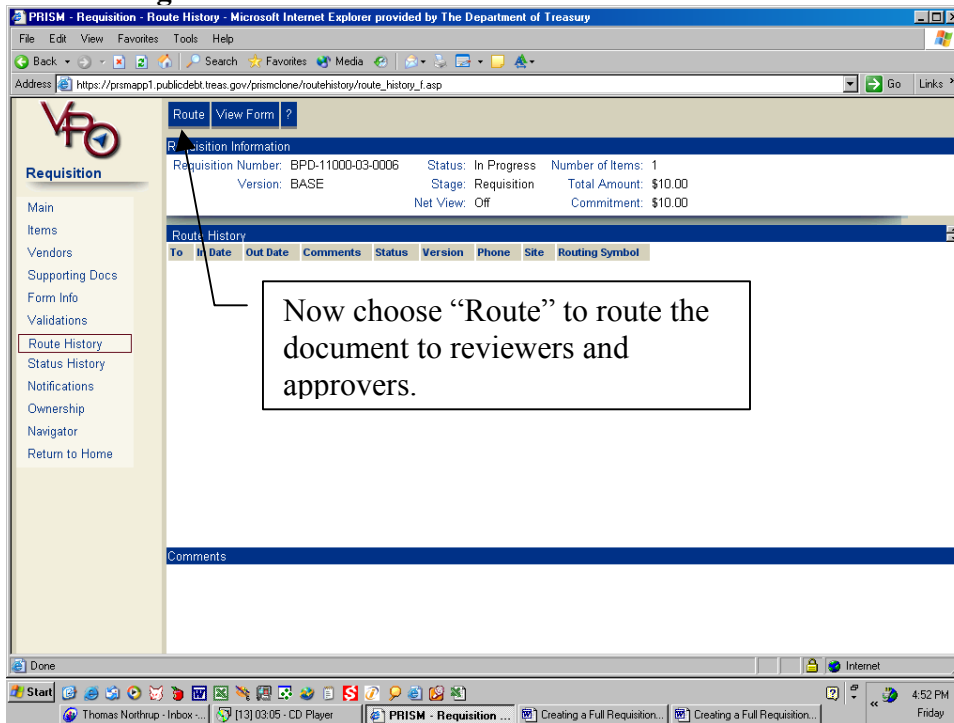
Copy Type: No Text View Form Cancel

Click "Cancel" to return to the menu.

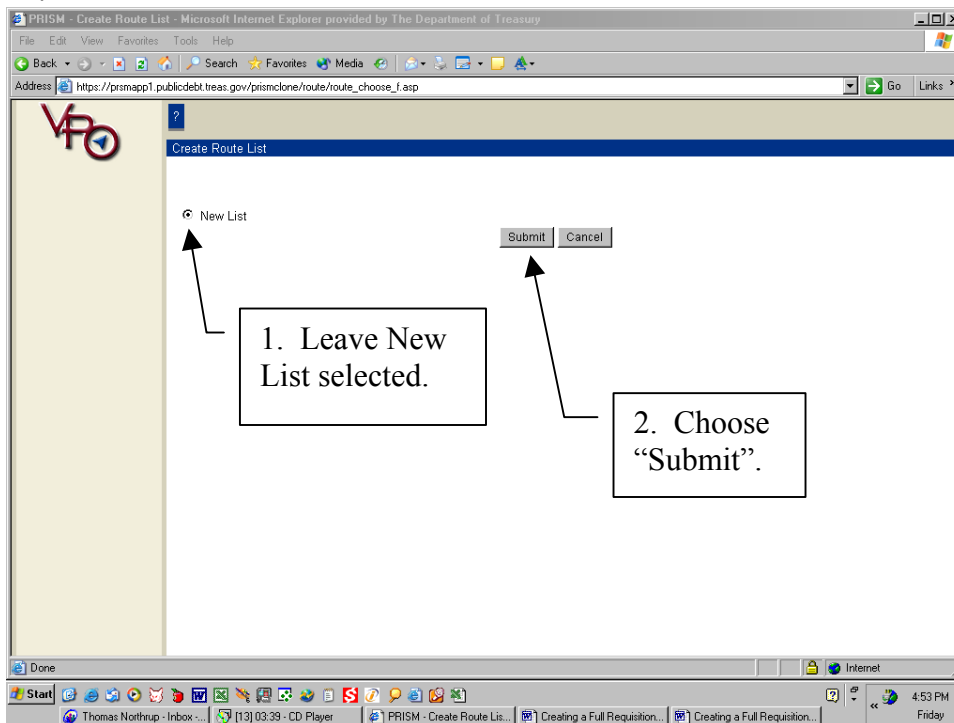
Done

Start Thomas Northrup - Inbox... [13] 02:39 - CD Player PRISM - View - Form - Mi... Creating a Full Requisition... Creating a Full Requisition... 4:52 PM Friday

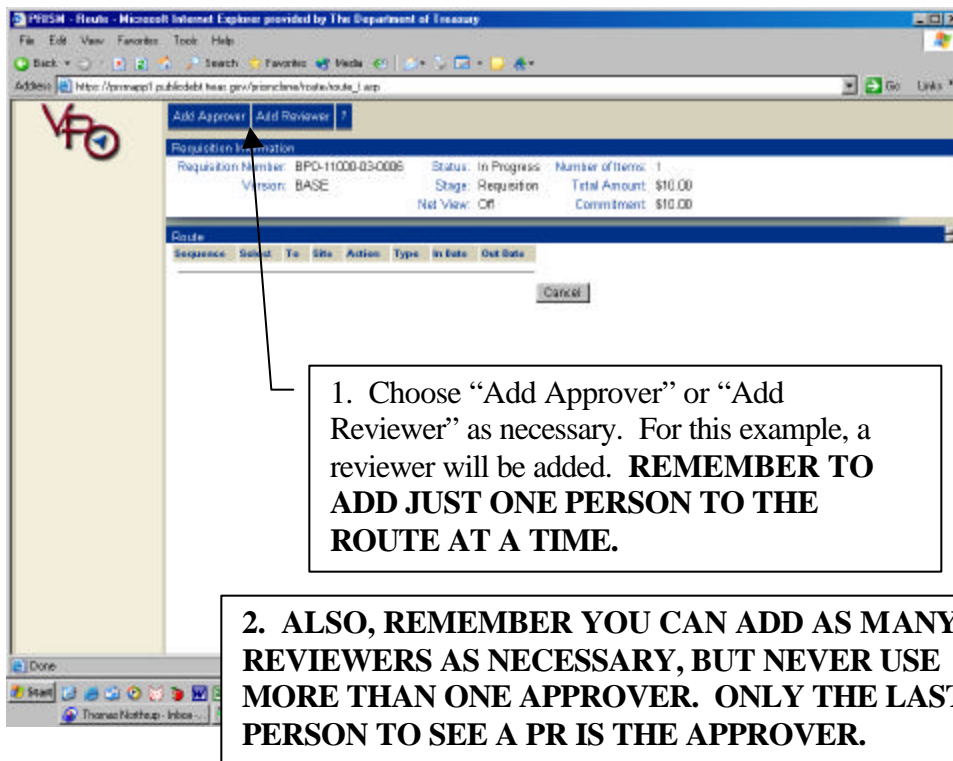
### 43. Routing



### 44.



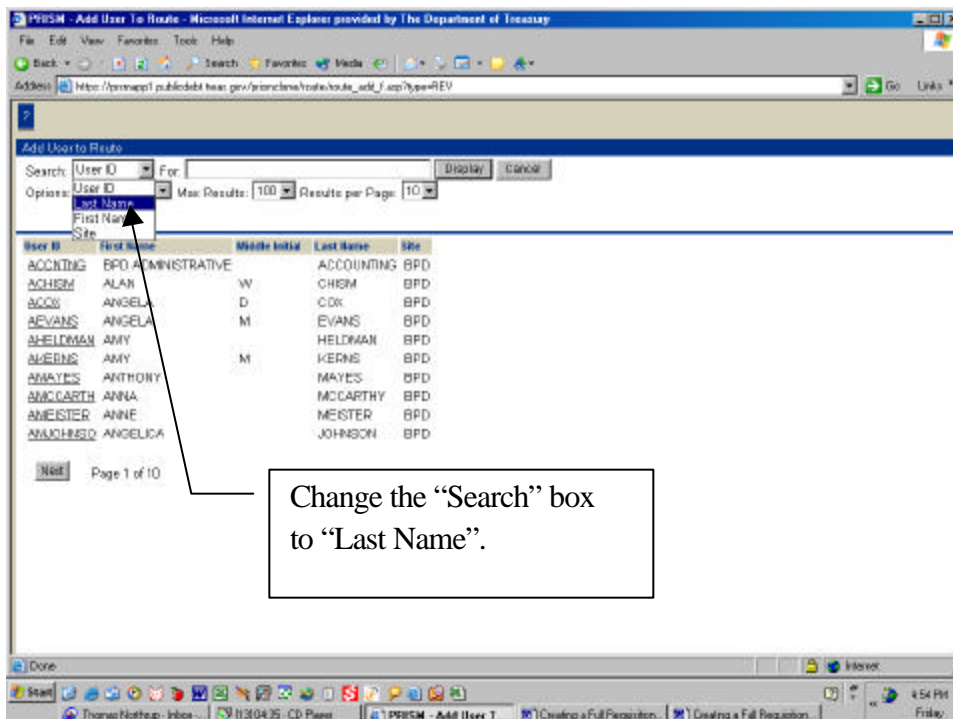
45.



1. Choose “Add Approver” or “Add Reviewer” as necessary. For this example, a reviewer will be added. **REMEMBER TO ADD JUST ONE PERSON TO THE ROUTE AT A TIME.**

2. ALSO, REMEMBER YOU CAN ADD AS MANY REVIEWERS AS NECESSARY, BUT NEVER USE MORE THAN ONE APPROVER. ONLY THE LAST PERSON TO SEE A PR IS THE APPROVER.

46.



Change the “Search” box to “Last Name”.

User ID	First Name	Middle Initial	Last Name	Site
ACCONTING	BPD ADMINISTRATIVE		ACCOUNTING	BPD
ACHERN	ALAN	W	CHERN	BPD
ACCOB	ANGELA	D	COB	BPD
AEVANS	ANGELA	M	EVANS	BPD
AHELDMAN	AMY		HELDMAN	BPD
AHERNS	AMY	M	KERNS	BPD
AMAYES	ANTHONY		MAYES	BPD
AMCARTHY	ANNA		MCCARTHY	BPD
AMESTER	ANNE		MESTER	BPD
AMACHES	ANGELICA		JOHNSON	BPD

47.

PRISM - Add User To Route - Microsoft Internet Explorer provided by The Department of Treasury

Address: [https://prismapp1.publicdebt.treas.gov/prismclone/route/route\\_add\\_f.asp?type=REV](https://prismapp1.publicdebt.treas.gov/prismclone/route/route_add_f.asp?type=REV)

Add User to Route

Search: Last Name For: northrup [Display] [Cancel]

Options: All Sites Max results: 100 Results per Page: 10

User ID	First Name	Middle Initial	Last Name	Site
TNORTHRU	THOMAS		NORTHUP	BPD PROCUREMENT

Page 1 of 1

1. Enter in the name of the person.

2. Click "Display".

3. Select the user ID of the person.

48.

PRISM - Route - Microsoft Internet Explorer provided by The Department of Treasury

Address: [https://prismapp1.publicdebt.treas.gov/prismclone/route/route\\_f.asp?button=delete](https://prismapp1.publicdebt.treas.gov/prismclone/route/route_f.asp?button=delete)

Add Approver Add Reviewer Move Up Move Down Delete ?

Requisition Information

Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1

Version: BASE Stage: Requisition Total Amount: \$10.00

Net View: Off Commitment: \$10.00

Sequence	Select	To	Site	Action	Type	In Date	Out Date
1	<input checked="" type="checkbox"/>	THOMAS NORTHUP	BPD PROCUREMENT	Ready to send	Review		

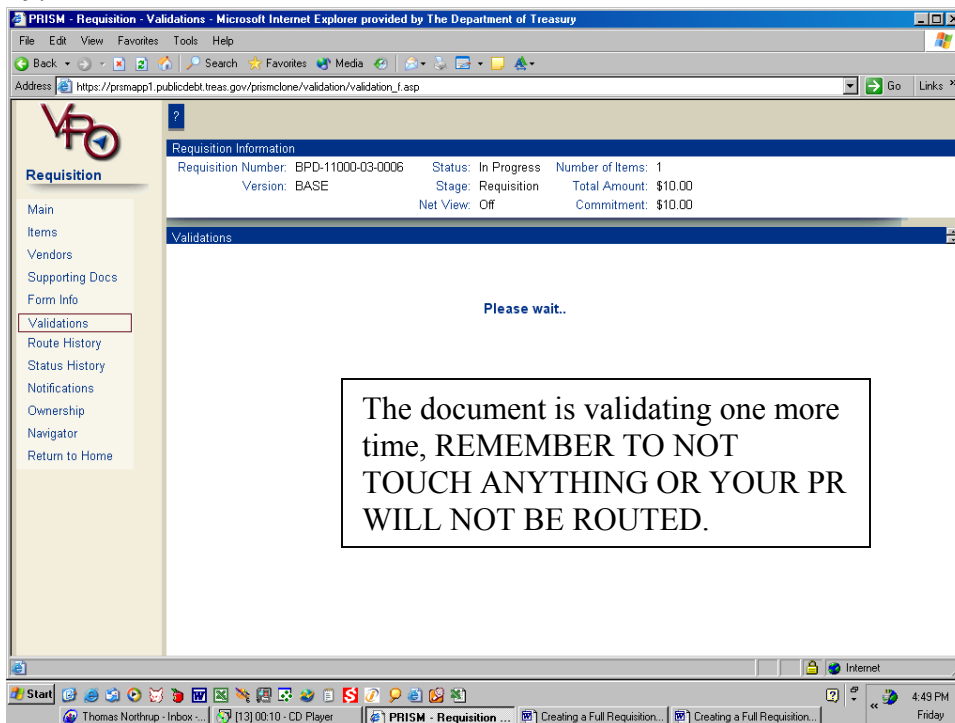
[Send] [Save] [Cancel]

Choose "Send" and then DO NOT TOUCH ANYTHING.

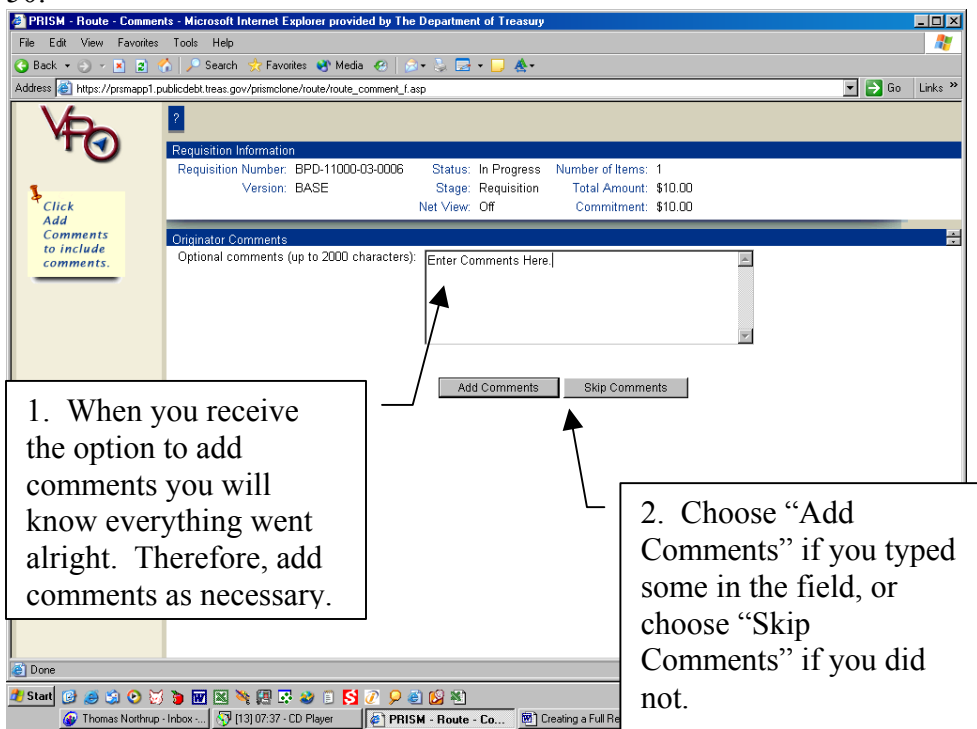
[Main Content]



49.



50.



51.

PRISM - Requisition - Route History - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/routehistory/route\_history\_f.asp

**Requisition Information**

Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$10.00  
 Net View: Off Commitment: \$10.00

To	In Date	Out Date	Comments	Status	Version	Phone	Site	Routing Symbol
THOMAS NORTHUP	05/23/03 04:57 PM		N	Sent	BASE		BPD PROCUREMENT	
ASB PRISM		05/23/03 04:57 PM	Y	Originator	BASE		BPD	

**Comments**

Enter Comments Here

1. Under the “Route History” section of the Requisition, if it says “Sent” by the person’s name then it is in their in-box. If it says, “Ready to Send” it did not go through properly. If this occurs, try deleting their name, and sending it to them again.

1. Click “Y” under “Comments” to view what was typed at the bottom of the screen.

2. If you ever need to change the route then enter the PR and come to “Route History” and choose “Change Route”.

52.

PRISM - Route - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/route/route\_f.asp

**Requisition Information**

Requisition Number: BPD-11000-03-0006 Status: In Progress Number of Items: 1  
 Version: BASE Stage: Requisition Total Amount: \$10.00  
 Net View: Off Commitment: \$10.00

Sequence	Select	To	Site	Action	Type	In Date	Out Date
1	<input checked="" type="checkbox"/>	THOMAS NORTHUP	BPD PROCUREMENT	Sent	Review	05/23/03 04:57 PM	

Note from ASB PRISM:  
 Enter Comments Here.

Routing List Comments:

Save Cancel

Then you may delete a user or add a new one as you choose.

## Appendix 1 (Editing Shipping Information)

*If the shipping address needs to be altered in anyway to increase the accuracy of the delivery process than follow the steps below:*

### 53. Editing the Shipping Address

The screenshot shows the PRISM Defaults web application. The left sidebar contains a navigation menu with the following items: Main, General, Additional Info, Project, Text, Defaults (highlighted), Summary, Items, Vendors, Supporting Docs, Form Info, Validations, Route History, Status History, Notifications, Ownership, Navigator, and Return to Home. The main content area displays the 'Defaults for New Items' section. The 'Ship To' field is set to 'PUBLIC DEBT - PKB'. There are two 'Edit' buttons next to the 'Ship To' and 'Mark For' fields. A callout box points to the 'Edit' button next to 'Ship To' with the text '2. Click "Edit" and NOT the look-up button.' Another callout box points to the 'Main: Defaults' link in the left sidebar with the text '1. Note we are under "Main: Defaults".' The top of the page shows the 'PRISM - Defaults' title and a Microsoft Internet Explorer browser window. The bottom of the page shows the Windows taskbar with the Start button, taskbar icons, and the system clock.

**THE SCREEN ABOVE IS THE DEFAULT MENU OF THE MAIN PAGE. HOWEVER, YOU CAN CHANGE THE SHIPPING INFORMATION FOR A SINGLE ITEM BY GOING WITHIN THAT ITEM UNDER THE “SHIP TO” TAB, WHICH WILL NOT BE DEPICTED HERE.**

54.

**PRISM - Ship To Address - Microsoft Internet Explorer provided by The Department of Treasury**

Address: [https://prismapp1.publicdebt.treas.gov/prismclone/docadd/docadd\\_f.asp](https://prismapp1.publicdebt.treas.gov/prismclone/docadd/docadd_f.asp)

**Requisition Information**

Requisition Number: BPD-11000-03-0006	Status: In Progress	Number of Items: 1
Version: BASE	Stage: Requisition	Total Amount: \$10.00
Net View: Off	Commitment: \$10.00	

**Ship To Address**

Code: PUBLIC DEBT - PKB

Name: PUBLIC DEBT - PKB

Address: BEST WAY-WAREHOUSE  
ATTENTION: JOHN HUGHES  
149 19TH STREET

City: PARKERSBURG

State: WV

Zip: 26101

Country: US

Phone: 304-480-5322

Fax:

Email:

*The entire address defaults in, as it has been setup in PRISM/Oracle.*

55.

**PRISM - Ship To Address - Microsoft Internet Explorer provided by The Department of Treasury**

Address: [https://prismapp1.publicdebt.treas.gov/prismclone/docadd/docadd\\_f.asp](https://prismapp1.publicdebt.treas.gov/prismclone/docadd/docadd_f.asp)

**Requisition Information**

Requisition Number: BPD-11000-03-0006	Status: In Progress	Number of Items: 1
Version: BASE	Stage: Requisition	Total Amount: \$10.00
Net View: Off	Commitment: \$10.00	

**Ship To Address**

Code: PUBLIC DEBT - PKB

Name: PUBLIC DEBT - PKB

Address: BEST WAY-WAREHOUSE  
ATTN: Jennifer Aniston & Brad Pitt  
123 Main Street

City: PARKERSBURG

State: WV

Zip: 26101

Country: US

Phone: 304-480-5322

Fax:

Email:

*1. You may change any of the information, with the exception of the "Code" field. The street address and the contacts have been changed here.*

*2. Choose "Submit".*

56.

PRISM - Defaults - Microsoft Internet Explorer provided by The Department of Treasury

Address: https://prismapp1.publicdebt.treas.gov/prismclone/requisition/defaults/defaults\_f.asp

Change Route | Suspend Line Items | View Form | Delete | Cancel | Renumber ?

**Requisition Information**

Requisition Number: BPD-11000-03-0006    Stage: Requisition    Number of Items: 1  
Version: BASE-In Progress    Net View: Off    Total Amount: \$10.00  
Commitment: \$10.00

**Defaults for New Items**

User Product Code:

Ship To: PUBLIC DEBT - PKB    Edit ...

Mark For:     Edit ...

Qualifier:

Delivery Date:  or Days After Award: 30

Period of Performance:  to

Select Accounting Code: Alias... A/C Combo...

Treasury Symbol: BPD0560SE03XX

Fiscal Year: 2003    BFY 2003

USSGL: 610001    OPERATING EXPENSES

Cost Code: BPD1100000    IMMEDIATE OFFICE

Object Class: 2611    GENERAL SUPPLIES

Reporting Category: 00000000

CAT. R APPR: XXX    DEFALTT

Done

Start | Thomas Northrup - Inbox... | [5] 02:35 - CD Player | PRISM - Defaults - M... | Creating a Full Requisition... | Creating a Full Requisition... | 6:15 PM Friday

The code looks the same as before, but the changes made have been stored and will print properly on the form.

## Appendix 2 (Dollar Based PR's)

57. Dollar based awards are useful when you do not know what the incremental payments will be, such as is the case with some monthly services.

1. Create the new line item that will be dollar based.

2. Use the drop-down box to select "By Dollars".

58.

1. The only required fields now are "Description" and "Amount".

2. After you have input the description and the amount, click "Ship To".

59.

60.

## Appendix 3 (Invalid Accounting Code Combination Error)

### 61. A/C Check

**EZ REQ Information**

Requisition Number: AR-38000-2002-0002    Status: In Progress    Number of Items: 1  
 Version: BASE    Stage: Requisition    Total Amount: \$

---

**Validations**

**Error Messages**

Location	Message
Item: 0001	Invalid Account Code Combination - CSB3850SE02XX-2002-610001-CSB

Total Errors: 1

**A/C Check**

1. If you ever get an error like this you need to dynamically insert this new Accounting Code, which sounds hard, but is really very simple.

2. Click on "A/C Check."

### 62. Dynamic Insert

**Dynamic Insert**

Account Code	Status	Message
	NEW	Request Posted

1. You may have to scroll to the right of your screen to see this text.

**Refresh**    **Done**

2. Click on "Refresh" until you see the next screen appear.



## 63. Successful Dynamic Insert

Dynamic Insert		
Account Code	Status	Message
	SUCCESS	No error message from OCI

1. Note how the “Status” has changed from “NEW” to “SUCCESS”. Sometimes, it may say “Valid” instead, which is fine.

Refresh Done

2. Click “Done” to complete the dynamic insertion.

If you receive a message that says “Failure” it will be followed by a reason for the failure. Make the necessary changes to your accounting data, or call 304-480-7272 and ask to speak to someone from SSB (Oracle) if you do not understand the message, or believe the message is incorrect.

## 64. No Errors

The screenshot shows the EZ REQ application interface. On the left is a navigation menu with the following items: Main, Items, Vendors, Supporting Docs, Form Info, **Validations** (highlighted with a red box), Route History, Status History, Notifications, Ownership, Navigator, and Return to Home. The main content area is titled 'EZ REQ Information' and displays 'Requisition Number: AR-38000-2002-0002' and 'Version: BASE'. Below this is a section titled 'Validations' which shows 'No Errors Found'. An arrow points from the 'Validations' section to a text box on the right. Another arrow points from the 'Main Content' label to the 'Validations' section.

You should receive “No Errors Found” at this point and you can now view the document and print it as you normally would.